

Rob Burgess - Wealth Management - Story List

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Rob Burgess

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Rob Burgess is a Technology Reporter at [WealthManagement.com](https://www.wealthmanagement.com). Rob is a 28-time award-winning journalist and has worked in television, podcasts, radio, print and online. A native Hoosier, he lives near Indianapolis.

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2022-10-07 - WM - LPL Pulls \$1B Firm From Merrill Lynch

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2022-10-18 - WM - Merrill Eyes Digital Marketing to Fuel Organic Advisor Growth

<https://www.wealthmanagement.com/industry/merrill-eyes-digital-marketing-fuel-organic-advisor-growth>

2022-10-19 - WM - Many Investors Aren't Preparing For Great Wealth Transfer | Wealth Management

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2022-10-24 - WM - Fidelity Pilots Direct Indexing Offering for Advisors

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2022-10-27 - WM - Schwab-TDAI 'Conversion Event' Slated for Labor Day Weekend 2023

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2022-11-01 - WM - Ten to Watch in 2023 - Marcel Tsai

<https://www.wealthmanagement.com/people/ten-watch-2023-marcel-tsai>

(This story was re-published in the October-November 2022 edition of *Wealth Management Magazine*.)

2022-11-01 - WM - Ten to Watch in 2023 - Laxmi Ramanath

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(This story was re-published in the October-November 2022 edition of *Wealth Management Magazine*.)

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(This story was written by Reporter Patrick Donachie, and Managing Editor Diana Britton and Reporter Rob Burgess contributed to this report.)

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(This story was co-written by reporter Rob Burgess and senior technology editor Davis Janowski.)

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(This story was co-written by reporter Rob Burgess and senior technology editor Davis Janowski.)

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2023-09-05 - WM - Schwab Reports No Major Issues After Labor Day Weekend TD Ameritrade Conversion

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(Reporter Ali Hibbs contributed to this report.)

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(This story was co-written by reporter Rob Burgess and senior technology editor Davis Janowski.)

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(Also published in the fourth quarter of 2023 edition of *Wealth Management Magazine*.)

2023-12-22 - WM - Tech Trends In Wealth Management To Watch In 2024

<https://www.wealthmanagement.com/technology/tech-trends-wealth-management-watch-2024>

2024-01-03 - WM - Six Months After Threads' Launch, Many Advisors Still Searching For An X Alternative

<https://www.wealthmanagement.com/technology/six-months-after-threads-launch-many-advisors-still-searching-x-alternative>

2024-01-05 - WM - TIFIN, Franklin Templeton To Launch TIFIN @Work

<https://www.wealthmanagement.com/technology/tifin-franklin-templeton-launch-tifin-work>

2024-01-08 - WM - What's Next For Envestnet After Bill Crager

<https://www.wealthmanagement.com/technology/what-s-next-envestnet-after-bill-crager>

2024-01-11 - WM - Advise Financial, A Technology And Services Co-Op For Advisors, Launches

<https://www.wealthmanagement.com/ria-news/advise-financial-technology-and-services-co-op-advisors-launches>

2024-01-12 - WM - WealthStack Roundup - Reputation Management Platform Testimonial IQ To Debut Upgrades

<https://www.wealthmanagement.com/technology/wealthstack-roundup-reputation-management-platform-testimonial-iq-debut-upgrades>

2024-01-19 - WM - Most Advisors Lukewarm Toward SEC-Approved Spot Bitcoin ETFs

<https://www.wealthmanagement.com/news/most-advisors-lukewarm-toward-sec-approved-spot-bitcoin-etfs>

(This story was co-written by reporter Rob Burgess and managi.)

2024-01-23 - WM - Income Lab Carves Out 'Life Hub' One-Pager as Separate, Cheaper Tool

<https://www.wealthmanagement.com/technology/income-lab-carves-out-life-hub-one-pager-separate-cheaper-tool>

2024-01-24 - WM - Anthony Stich Leaves Entrustody

<https://www.wealthmanagement.com/people/anthony-stich-leaves-entrustody>

2024-01-25 - WM - T3: Rapid Uptick in Tax and Estate Planning Software By Advisors

<https://www.wealthmanagement.com/technology/t3-rapid-uptick-tax-and-estate-planning-software-advisors>

2024-01-29 - WM - Q&A - 55ip CEO Paul Gamble

<https://www.wealthmanagement.com/technology/qa-55ip-ceo-paul-gamble>

2024-01-31 - WM - Founders Arena Will Be Back For Second Season Of Its WealthTech Accelerator

<https://www.wealthmanagement.com/technology/founders-arena-will-be-back-second-season-its-wealthtech-accelerator>

2024-02-05 - WM - Kitces Podcast Sparks Debate on Google Reviews

<https://www.wealthmanagement.com/industry/kitces-podcast-sparks-debate-google-reviews>

2024-03-11 - WM - Ex-Osaic Employee Files Disability Discrimination Lawsuit Over COVID-19

<https://www.wealthmanagement.com/people/ex-osaic-employee-files-disability-discrimination-lawsuit-over-covid-19>

2024-03-13 - WM - Apex Continues To Make Moves To Compete With Big Three Custodians

<https://www.wealthmanagement.com/technology/apex-continues-make-moves-compete-big-three-custodians>

2024-03-15 - WM - WealthStack Roundup - Lead Gen Startup WealthFeed Raises \$2M

<https://www.wealthmanagement.com/wealthstack/wealthstack-roundup-lead-gen-startup-wealthfeed-raises-2m>

2024-03-19 - WM - InvestCloud Joins Orion As Latest Advisor Tech Firm to Raise Prices

<https://www.wealthmanagement.com/technology/investcloud-joins-orion-latest-advisor-tech-firm-raise-prices>

2024-03-21 - WM - Shaping Wealth Develops AI-Powered Behavioral Finance Assistant

<https://www.wealthmanagement.com/technology/shaping-wealth-develops-ai-powered-behavioral-finance-assistant>

2024-03-25 - WM - Roger Hobby Named Executive Vice President For Empower Personal Wealth

<https://www.wealthmanagement.com/people/roger-hobby-named-executive-vice-president-empower-personal-wealth>

2024-04-03 - WM - 55ip CEO Paul Gamble to Step Down in September

<https://www.wealthmanagement.com/technology/55ip-ceo-paul-gamble-step-down-september>

2024-04-09 - WM - J.P. Morgan Asset Management Solutions Names New CIO of Tax Smart Strategies

<https://www.wealthmanagement.com/news/jp-morgan-asset-management-solutions-names-new-cio-tax-smart-strategies>

2024-04-09 - WM - Ron Carson Steps Down as Carson Group CEO

<https://www.wealthmanagement.com/news/ron-carson-steps-down-carson-group-ceo>

2024-04-11 - WM - Carson Group Names Dani Fava As Chief Strategy Officer

<https://www.wealthmanagement.com/news/carson-group-names-dani-fava-chief-strategy-officer>

2024-04-16 - WM - Merrill Reports Record Assets, Slower Pace of New Clients

<https://www.wealthmanagement.com/industry/merrill-reports-record-assets-slower-pace-new-clients>

2024-04-22 - WM - Ritholtz Wealth Management Opens Los Angeles Office

<https://www.wealthmanagement.com/ria-news/ritholtz-wealth-management-opens-los-angeles-office>

2024-04-23 - WM - Former Pro Baseball Player Will Advise NFLers

<https://www.wealthmanagement.com/people/former-pro-baseball-player-will-advise-nflers>

2024-04-25 - WM - WealthStack Roundup - Jeanette Kuda Named COO of TIFIN AG

<https://www.wealthmanagement.com/technology/wealthstack-roundup-jeanette-kuda-named-coo-tifin-ag>

2024-05-03 - WM - WealthStack Roundup - 'Invent Village' To Debut At Wealth Management EDGE 2024

<https://www.wealthmanagement.com/wealthstack/wealthstack-roundup-invent-village-debut-wealth-management-edge-2024>

2024-05-06 - WM - Focus Financial Merges Buckingham Strategic Wealth With The Colony Group

<https://www.wealthmanagement.com/ria-news/focus-financial-merges-buckingham-strategic-wealth-colony-group>

2024-05-08 - WM - AdvicePay Promotes Kelsey Lewis To President

<https://www.wealthmanagement.com/people/advicepay-promotes-kelsey-lewis-president>

2024-05-09 - WM - WealthStack Roundup - Advisor360° Adds GWN Securities as a Client

<https://www.wealthmanagement.com/news/wealthstack-roundup-advisor360-adds-gwn-securities-client>

2024-05-10 - WM - AlTi Tiedemann Global Acquires \$3B Multi-family Office Envoi

<https://www.wealthmanagement.com/ria-news/alti-tiedemann-global-acquires-3b-multi-family-office-envoi>

(This story was co-written by reporter Rob Burgess and WMRE editorial director David Bodamer.)

2024-05-13 - WM - The AI Assembly at Wealth Management EDGE - The Future of AI

<https://www.wealthmanagement.com/wealthstack/ai-assembly-wealth-management-edge-future-ai>

2024-05-14 - WM - Wealth Management EDGE - With AI Prompt Engineering, It's 'Garbage In, Garbage Out'

<https://www.wealthmanagement.com/wealthstack/wealth-management-edge-ai-prompt-engineering-it-s-garbage-garbage-out>

2024-05-14 - WM - Wealth Management EDGE - Future Advisors Will Have to Pick Up Where AI Falls Short

<https://www.wealthmanagement.com/wealthstack/wealth-management-edge-future-advisors-will-have-pick-where-ai-falls-short>

2024-05-14 - WM - RIA Edge Live Blog - Selling Growth

<https://www.wealthmanagement.com/ria-edge/ria-edge-live-blog-selling-growth>

(This story was co-written by reporter Rob Burgess and reporters Patrick Donachie and Elaine Misonzhnik.)

2024-05-14 - WM - WealthStack Live Blog - All About AI

<https://www.wealthmanagement.com/wealthstack/wealthstack-live-blog-all-about-ai>

(This story was co-written by reporter Rob Burgess and reporter Elaine Misonzhnik.)

2024-05-15 - WM - Advisors - Go Ahead And Kick The Tires On AI

<https://www.wealthmanagement.com/wealthstack/advisors-go-ahead-and-kick-tires-ai>

2024-05-16 - WM - WealthStack - Using Technology, Automation To Remove Friction

<https://www.wealthmanagement.com/wealthstack/wealthstack-using-technology-automation-remove-friction>

2024-05-16 - WM - WealthStack - Meet Your Clients On Social Media In Your Own Voice

<https://www.wealthmanagement.com/wealthstack/wealthstack-meet-your-clients-social-media-your-own-voice>

2024-05-20 - WM - WealthStack - Marketing Is An Investment To Be Tracked

<https://www.wealthmanagement.com/wealthstack/wealthstack-marketing-investment-be-tracked>

2024-05-21 - WM - Wealthstack Roundup - Ron Pruitt Named Orion Wealth Management President

<https://www.wealthmanagement.com/technology/wealthstack-roundup-ron-pruitt-named-orion-wealth-management-president>

2024-05-24 - WM - SEC Adopts Updated Cybersecurity Rules

<https://www.wealthmanagement.com/regulation-compliance/sec-adopts-updated-cybersecurity-rules>

2024-05-31 - WM - WealthStack Roundup - MassMutual Advisors To Have Access To CAIS Alts Platform

<https://www.wealthmanagement.com/technology/wealthstack-roundup-massmutual-advisors-have-access-cais-alt-platform>

2024-05-31 - WM - Missouri Regulators Send Warning Letter to Advisors Using Data Aggregation Tech

<https://www.wealthmanagement.com/technology/missouri-regulators-send-warning-letter-advisors-using-data-aggregation-tech>

2024-06-04 - WM - Conquest Planning Upgrades Its Strategic Advice Manager

<https://www.wealthmanagement.com/technology/conquest-planning-upgrades-its-strategic-advice-manager>

2024-06-04 - WM - BNY Mellon's Pershing X Upgrades Wove Platform

<https://www.wealthmanagement.com/technology/bny-mellon-s-pershing-x-upgrades-wove-platform>

2024-06-07 - WM - WealthStack Roundup - Advyzen Investment Management Names Scott Smith Chief Revenue Officer

<https://www.wealthmanagement.com/technology/wealthstack-roundup-advyzen-investment-management-names-scott-smith-chief-revenue-officer>

2024-06-10 - WM - YourStake To Provide AI-Powered APIs To Apex Fintech Solutions

<https://www.wealthmanagement.com/technology/yourstake-provide-ai-powered-apis-apex-fintech-solutions>

2024-06-11 - WM - AI-Powered Financial Research Assistant Brightwave Raises \$6M In Seed Funding

<https://www.wealthmanagement.com/technology/ai-powered-financial-research-assistant-brightwave-raises-6m-seed-funding>

2024-06-11 - WM - Yext to Acquire Hearsay Systems

<https://www.wealthmanagement.com/technology/yext-acquire-hearsay-systems>

2024-06-13 - WM - Fidelity, Envestnet Increase Collaboration On Managed Accounts

<https://www.wealthmanagement.com/technology/fidelity-envestnet-increase-collaboration-managed-accounts>

2024-06-20 - WM - AssetMark To Acquire \$12B In Assets From Morningstar Wealth TAMP

<https://www.wealthmanagement.com/technology/assetmark-acquire-12b-assets-morningstar-wealth-tamp>

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WHAT'S IN MY WEALTHSTACK

What's In My Wealthstack

Chief technology officers from top RIAs in the wealth management industry detail the software tools they are using to drive their business.

As told to reporter Rob Burgess and edited for length and clarity. The views and opinions are not representative of the views of WealthManagement.com.

Want to tell us what's in your wealthstack? Contact Rob Burgess at Robert.Burgess@informa.com.

<https://www.wealthmanagement.com/whats-my-wealthstack>

2023-10-27 - WM - What's In My Wealthstack - There Is No Perfect CRM

<https://www.wealthmanagement.com/wealthstack/there-no-perfect-crm>

Amy Flourry, director of operations at Rehmann Financial, gives an honest assessment of the tech tools the \$3 billion AUM RIA uses to drive business.

2023-11-03 - WM - What's In My Wealthstack - Planning With Two For Now

<https://www.wealthmanagement.com/technology/planning-two-now>

Vib Arya, chief operating officer at Shufro Rose & Co., provides an honest assessment of the technology tools used by the \$1.8 billion AUM firm to work with clients and drive business.

2023-11-10 - WM - What's In My Wealthstack - Merging The Tech Of Two Firms Can Be A Challenge

<https://www.wealthmanagement.com/technology/merging-tech-two-firms-can-be-challenge>

Trevor Hicks, chief technology officer at Wetherby Asset Management and Laird Norton Wealth Management, provides an honest assessment of the technology tools used by the \$14 billion AUM firms to work with clients and drive business.

2023-11-17 - WM - What's In My Wealthstack - Keeping The Tech Simple

<https://www.wealthmanagement.com/technology/keeping-tech-simple>

Ron Chandler, president of Summit Investment Management, provides an honest assessment of the technology tools used by the \$75-million-AUM firm to work with clients and drive business.

2023-11-22 - WM - What's In My Wealthstack - Working With A Mix Of Advisor-Specific And Customized Business Technology

<https://www.wealthmanagement.com/technology/working-mix-advisor-specific-and-customized-business-technology>

Gregory Gardner relies in large measure on technologies from Orion Advisor Solutions to run and manage his \$85 million in AUM RIA, but has gone a different route with some of his tech.

2023-11-30 - WM - What's In My Wealthstack - A Tug Of War Between Best of Breed And Best Fit

<https://www.wealthmanagement.com/technology/tug-war-between-best-breed-and-best-fit>

As situations change, Jeff Nauta has found that the technology has to sometimes do the same at \$528 million AUM Henrickson Nauta Wealth Advisors.

2023-12-08 - WM - What's In My Wealthstack - SignatureFD - Leaving The Server Behind

<https://www.wealthmanagement.com/technology/signaturefd-leaving-server-behind>

Migrating to modern cloud-based services is helping CIO Laura Hubbell not only serve clients better but scale the business at \$7.4 billion AUM SignatureFD.

2023-12-15 - WM - What's In My Wealthstack - TandemGrowth Financial Advisors- Technology As A Force Multiplier

<https://www.wealthmanagement.com/technology/tandemgrowth-financial-advisors-technology-force-multiplier>

Jeff Bernier, president of \$200 million AUM TandemGrowth Financial Advisors, says his team squeezes all the productivity possible from a selectively chosen tech stack.

2023-12-22 - WM - What's In My Wealthstack - Saratoga Investment Solutions - The Never-Ending Journey Toward Full Integration

<https://www.wealthmanagement.com/technology/saratoga-investment-solutions-never-ending-journey-toward-full-integration>

Cynthia Zalewsky, president of \$45 million AUM Saratoga Investment Solutions, has sought deeply integrated applications for years—her search goes on.

2024-01-04 - WM - What's In My Wealthstack - CFS Investment Advisory Services - It's All About The Custodian

<https://www.wealthmanagement.com/technology/cfs-investment-advisory-services-it-s-all-about-custodian>

Greg Makowski, founding partner of \$2 billion AUM CFS, relies on custodian Raymond James for much of its technology.

2024-01-12 - WM - What's In My Wealthstack - Walkner Condon Financial Advisors - The Pros and Cons of Consolidating a Tech Stack

<https://www.wealthmanagement.com/technology/walkner-condon-financial-advisors-pros-and-cons-consolidating-tech-stack>

Clint Walkner of \$560 million AUM Walkner Condon likes the scope of an all-in-one platform but at times misses some best-of-breed tools.

2024-01-19 - WM - What's In My Wealthstack - Plancorp - Dipping A Toe In The AI Waters, With An Eye On Cybersecurity

<https://www.wealthmanagement.com/technology/plancorp-dipping-toe-ai-waters-eye-cybersecurity>

Mike Esson, chief information security officer of \$6 billion AUM Plancorp, seeks an edge through the latest technology but always weighs it against data security.

2024-02-16 - WM - What's In My Wealthstack - Ensemble Capital - The Tinkering Never Ends

<https://www.wealthmanagement.com/technology/ensemble-capital-tinkering-never-ends>

Matt Pearson, chief operations officer of \$1.5 billion AUM Ensemble Capital, and his team are unafraid of trying new technology.

2024-02-23 - WM - What's In My Wealthstack - Crescent Grove Advisors - Sifting The Data Looking For Trends

<https://www.wealthmanagement.com/technology/crescent-grove-advisors-sifting-data-looking-trends>

Nick Kochanski, CFO and senior client advisor at \$4.5 billion AUM Crescent Grove Advisors, uses advances in technology to look at client and firm data in new ways to drive growth.

2024-02-28 - WM - What's In My Wealthstack - Stepp & Rothwell - Keeping It Old School

<https://www.wealthmanagement.com/technology/stepp-rothwell-keeping-it-old-school>

Ross Lehman, assistant investment officer of \$773 million AUM Stepp & Rothwell, Inc., still provides a bespoke client experience.

2024-03-22 - WM - What's In My Wealthstack - Robertson Stephens - Building An Integrated Stack One Piece At A Time

<https://www.wealthmanagement.com/wealthstack/robertson-stephens-building-integrated-stack-one-piece-time>

Vikram Chugh, who heads up technology and operations for \$5.1 billion AUM, 92-employee Robertson Stephens, said the firm has carefully selected each piece of its tech stack.

2024-03-29 - WM - What's In My Wealthstack - Steward Partners - No Two Advisors Are The Same

<https://www.wealthmanagement.com/wealthstack/steward-partners-no-two-advisors-are-same>

Mohan Gurupackiam, CIO of \$32 billion AUM Steward, shares how evaluating and adopting new technology strengthens the firm.

2024-04-04 - WM - What's In My Wealthstack - Halbert Hargrove - Efficiency And A Focus On Cybersecurity

<https://www.wealthmanagement.com/technology/halbert-hargrove-efficiency-and-focus-cybersecurity>

Shane Cummings, an advisor and director of technology and cybersecurity, has helped keep the \$3 billion AUM firm efficient, flexible and focused on security.

2024-04-11 - WM - What's In My Wealthstack - Merit Financial Advisors - Using Technology To Fuel Growth

<https://www.wealthmanagement.com/technology/merit-financial-advisors-using-technology-fuel-growth>

JP Pattinson, wealth manager, vice president of technology and partner at Merit Financial Advisors, has helped shape the rapid expansion of the \$10-billion-AUM firm through technology.

2024-04-26 - WM - What's In My Wealthstack - Prospero Wealth - Maximizing the Use of an All-In-One Platform

<https://www.wealthmanagement.com/technology/prospero-wealth-maximizing-use-all-one-platform>

Advisor Eric Franklin discusses how the \$39 million AUM firm gets the most out of Advyzon while keeping an eye on its competitors.

2024-05-03 - WM- What's In My Wealthstack - Willow Creek Wealth Management - Squeezing Maximum Value Out Of Technology

<https://www.wealthmanagement.com/technology/willow-creek-wealth-management-squeezing-maximum-value-out-technology>

Timothy Admire, president and CEO of Willow Creek Wealth Management, discusses maximizing the capabilities of the technology his \$1.7 billion AUM firm is already paying for.

2024-05-09 - WM - What's In My Wealthstack - Prime Capital Investment Advisors - If It's Not In Salesforce, It Didn't Happen

<https://www.wealthmanagement.com/technology/prime-capital-investment-advisors-if-it-s-not-salesforce-it-didn-t-happen>

CFO Brian Dillbeck explains how deep integration within the CRM of the \$24.4 billion AUM firm makes client data easy to access.

2024-05-31 - WM - What's In My Wealthstack - WealthChoice - Using Tech To Serve Women Breadwinners

<https://www.wealthmanagement.com/technology/wealthchoice-using-tech-serve-women-breadwinners>

Bridget Venus Grimes, founder of WealthChoice and co-founder of Equita Financial Network, explains how her \$90 million AUM firm uses its tech stack to help women tech workers, attorneys, founders and business owners navigate financial challenges.

2024-06-06 - WM - What's In My Wealthstack - StraightLine Group - Customizing The Tech Stack For Clients In Retirement

<https://www.wealthmanagement.com/technology/straightline-group-customizing-tech-stack-clients-retirement>

Chief Growth Officer Rob Rickey discusses the modifications the \$1.1 billion AUM firm has made to serve its clientele.

2024-06-14 - WM - What's In My Wealthstack - OFC Wealth Management - Taking Some Of The Stress Out Of Divorce With Specialized Software

<https://www.wealthmanagement.com/wealthstack/ofc-wealth-management-taking-some-stress-out-divorce-specialized-software>

Emily Jaffe, president and Certified Divorce Financial Analyst at OFC Wealth Management, uses a customized technology stack at her \$137 AUM firm to bring “Order From Chaos.”

2024-06-21 - WM - What's In My Wealthstack - Tepp Wealth Management - Approaching The Tech Stack From A Tax-Smart Perspective

<https://www.wealthmanagement.com/technology/tepp-wealth-management-approaching-tech-stack-tax-smart-perspective>

David Tepp, founder and CEO of Tepp Wealth Management, discusses how he uses his CPA background to center financial planning for clients of his \$130 million AUM firm.